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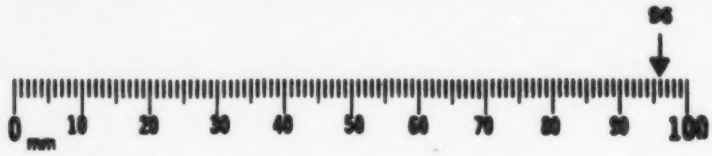
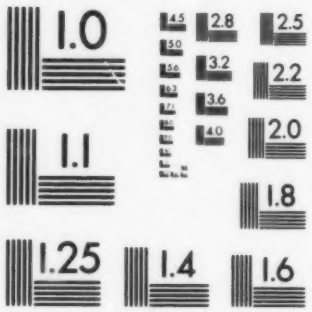


PM-1 3½"x4" PHOTOGRAPHIC MICROCOPY TARGET
NBS 1010a ANSI/ISO #2 EQUIVALENT



MICROCOPY RESOLUTION TEST CHART
NATIONAL BUREAU OF STANDARDS
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NATIONAL MICROGRAPHICS ASSOCIATION

24x

Province of
British Columbia

Ministry of
Agriculture
and Fisheries

Honourable John L. Savage, Minister

STRATEGIC PLANNING for the 1990's

THE MINISTRY'S BUSINESS PLAN . . . A FRAMEWORK

90-02841/

The economic contribution to British Columbia from the agriculture, fish and food sector this year is rapidly approaching nine billion dollars. This sector employs over a quarter of a million people and is growing at three to five percent per year.

The strong heritage that has been built by the pioneers in industry has placed us in an excellent position to prepare for the challenge that the 1990's will bring.

The world economy is changing and we are faced with the situation that world markets dominate more than ever before. It is our challenge to stay competitive and to grow stronger to assure our future. The nature of our diversification throughout British Columbia gives us the foundation on which to plan and build.

Our planning, our decisions, our use of new technology and methods of doing business must be accurate and forward looking. The margin of error for mistakes can cost us dearly and it is through our joint efforts that British Columbia will move towards a strong tomorrow.

The Ministry has prepared this document to help facilitate the discussion, the planning and the focus that will be needed to look at where we have been, what we are doing now and where we want to go. The intention is to provide a framework for input from as many people as possible in establishing a gameplan for the future development of the agriculture, fish and food industries. Through discussion, a more complete picture of our hopes and our expectations will evolve to ensure that British Columbia continues to be a world leader in safe, high quality products.

I look forward to hearing your ideas.

John Savage
Minister of Agriculture and Fisheries

The Ministry of Agriculture and Fisheries will encourage sustainable growth and development of industries involved in producing, processing, distributing, and selling agricultural, fish and food products in British Columbia to meet demand in domestic and export markets.

The ministry conducts its business on the basis of the following operating principles:

Global Economy:
British Columbia agriculture, fish and food industries will compete in a global economy.

Competitiveness Based upon Quality:
The growth and development of British Columbia's agriculture, fish and food sectors depends upon industry's ability to produce products that are safe, wholesome, and of the highest quality.

Commitment to Service:
The delivery of service is motivated by a desire to achieve and maintain the highest standards. Ministry clients will at all times be dealt with in a courteous, friendly, and helpful manner.

Regional Development:
Emphasis will be placed upon serving the special needs of all economic regions of the province.

The Importance of Staff Contribution:
The Ministry's most important resource is its people. The Ministry will provide an environment that fosters personal achievement and will manage with a team approach, using the best possible allocation of skills and resources. Special efforts will be undertaken to ensure fair and equal opportunities for women.

Management by Objectives:
Ministry staff will relate day-to-day activities to achievable goals identified in the Ministry Business Plan.

FREE TRADE

Agriculture and fisheries markets are becoming increasingly international. These markets will face intense pressure through protectionism, subsidization and national security policies. Large trading blocks will expand in influence.

Implications:

- Improved trading conditions for natural product industries need to be developed. This includes levelling tariffs, reducing non-tariff barriers, reconciling differing standards on inputs, and rationalizing subsidies, to permit British Columbia firms to compete with firms elsewhere.
- Free Trade and Multilateral Trade Agreements being sought by the Government of Canada will intensify the need for market awareness, flexibility and rapid implementation of new technological capabilities. Rapid evaluation and transfer of new knowledge will be increasingly important to successfully capture new markets.
- Where goods and services are not reasonably priced, food processors trading into global markets will relocate to other suitable markets.
- British Columbia industry needs to be aware of special measures in other jurisdictions and for other commodity groups, and will probably demand equivalent support levels to maintain competitiveness.
- The British Columbia agriculture and fish industries will be increasingly exposed to pests and diseases from external sources. Expert diagnostic services that ensure animal and plant health will be required to protect the marketability of British Columbia products.
- International competitors can be expected to make increasing use of retaliatory action provisions under GATT and the Canada/U.S. Free Trade Agreement.

INCREASED DEMAND & CHANGES IN CONSUMPTION

The demand for food products, services and technology will continue to increase. At the same time, major changes in buying patterns and consumer tastes due to demographic, economic and lifestyle changes will continue. There will be continued strong demand for some products for which British Columbia enjoys unique comparative advantages (e.g., seafood, game and selected horticultural crops).

Implications:

- Expanding and increasingly segmented domestic and global markets will provide new opportunities for British Columbia natural product industries. Industries within the agriculture and fish sectors are likely to remain highly diversified (and geographically dispersed).
- Niche-type specialized markets will require high production, marketing and financial management levels; high capitalization; and constant innovation. Research and especially technology transfer will be needed. The vast range of our commodities (over 130) will require competitive strategies that overcome the lack of economies of scale.
- There will be increased demands for seafood products; nutritional menus, fast/convenience foods; organic foods and ethnic foods.

Environmental Assessment

PUBLIC CONCERN FOR SAFETY & QUALITY

Consumer and public awareness will intensify demands for food safety, quality, animal health and well being, as well as environmental quality. The resource base will be challenged to provide natural products demanded by consumers, while industry seeks long-term sustainability.

Implications:

- Natural and high-quality foods will become an increasingly important market segment.
- Consumer demand for assurance regarding environmental integrity, clear and concise labelling, food safety, purity, and quality will lead to new regulatory requirements.
- Demands for involvement of public and special interest groups, in economic decision-making and land use conflict resolution, will intensify.
- Production techniques will have to adapt to public expectations and concerns about environmental quality.
- Closer working relationships with other government agencies involved in regulation of food safety and environmental quality will be required.
- Increasing litigation will slow industry's responsiveness to market opportunity and add to production costs.
- Some current techniques may have to be withdrawn or replaced at significant cost to industry.

UNPREDICTABLE MARKETS, PRODUCTION CONDITIONS & PRICES

World commodity markets and prices for natural products will remain unpredictable, as supply is influenced by production factors beyond the control of producers and the long-term nature of production decisions.

Implications:

- Demands for income stabilization, crop insurance, and disaster relief will continue.
- There will be continued investment in controlled environment production systems: aquaculture, greenhouse, storage, and new processing methods.
- Adjustment programs will be demanded as we move toward free trade.

LIMITATIONS ON THE NATURAL RESOURCE BASE, CHANGING DEMOGRAPHICS & NEW PRODUCTION METHODS

In many areas, the resource base is being used to full capacity under existing technology (e.g., commercial fish stocks or water for irrigation). Enhanced production will result primarily from technological innovation and intensification of resource use.

Implications:

- Limitations on the resource base and changing demographics such as the continuing shift of population from rural to urban areas will cause resource-use conflicts to become more frequent and intense. The Ministry will be asked to intervene in inter-sectoral disputes.
- The need for long-term solutions to problems such as water management and waste disposal is becoming critical.
- Industry operations will become more intensive, requiring enhanced management skill and increased investment.
- There will be fewer, but more specialized, farmers and fishermen. An increasing proportion of the productive land base will be in the hands of an aging population.
- Access to international technology will be essential to increasing competitiveness.

Implementation of Government policy

Ensure that a sound policy framework is maintained by

- assessing the issues related to the agriculture, fish and food industries in British Columbia
- identifying policy options and advising the Minister on policies, strategies, and the economic benefits of projects and development opportunities
- implementing Cabinet-approved policies in an efficient and effective manner
- assisting other ministries and agencies of government in understanding the special needs of British Columbia agriculture, fish and food industries.

Manage Ministry affairs according to a business plan, in order to

- achieve financial accountability
- provide a fair, consistent and relevant basis for appraisal of staff performance
- ensure appropriate staff input at all levels, effective management reporting and systematic issues management
- maximize co-ordination and effectiveness of staff efforts.

Enhance public awareness regarding the economic and cultural significance of the agriculture, fish and food industries within British Columbia to

- improve public understanding and acceptance of public policies related to agriculture, fish and food industries
- improve understanding of the food production chain particularly among new and young British Columbians
- increase among British Columbians a loyalty to the products of the Province's agriculture, fish and food industries.

Strategic Priorities

Promote a competitive market environment

Assist in national and provincial initiatives to

- achieve freer trade and gain greater access to other markets for British Columbia products
- influence international regulations on production inputs
- rationalize industry development incentives within a national and international context
- ensure that market signals are clear and market opportunities are identified.

Actively participate in a follow-up to the "National Strategies" discussions regarding natural product industries to

- better harmonize national and provincial programs, consistent with international obligations
- achieve greater co-operation in marketing efforts to increase effectiveness in penetrating export markets
- maintain the integrity of our resource base as the foundation for sustainable growth and development of the agriculture, fish and food industries.

Gradually modify financial programs in order to

- move the industry toward self-sufficiency supported by, appropriate, actuarially sound insurance programs
- ensure that displaced workers have access to alternate economic opportunities
- ensure continued access of British Columbia industry to national economic opportunities
- target economic development activities in areas that promise the highest returns on investment.

Strategic Priorities

Promote successful entrepreneurship among producers, processors, distributors and marketers of food and other British Columbia agricultural, fish and food products

Encourage industry to aggressively develop and commercially pursue

- new products
- new processes
- new markets.

Encourage communication and co-operation within the British Columbia food system, through effective business relationships among producers, processors, distributors and marketers, in order to

- lower the costs of production and transportation
- improve the industry's ability to respond to new market opportunities.

Enhance competitiveness of the agriculture, fish and food industries by

- promoting research that is relevant to these industries
- assisting in effectively transferring technology to producers and processors (i.e., by providing opportunities for them to gain knowledge and apply the most recent technological developments related to their area).

Strategic Priorities

Ensure that the products of British Columbia's agriculture, fish and food industries are of the highest quality

Foster environmentally sound economic growth and diversification of the province's agriculture, fish and food industries.

- Assisting industry in adopting production techniques to public expectations and concerns about environmental quality.
- Building effective working relationships between industry and government agencies involved in regulating food safety and environmental quality.
- Promoting public understanding of food safety and environmental concerns.

Maintain the ability to

- systematically and efficiently monitor plant and animal health, in order to protect the production capability of British Columbia products
- promote food safety and quality to protect the marketability of British Columbia
- promote environmental integrity, in order to sustain the British Columbia agriculture, fish and food industries.

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